

# China Solid Waste Treatment Industry Report, 2007-2008



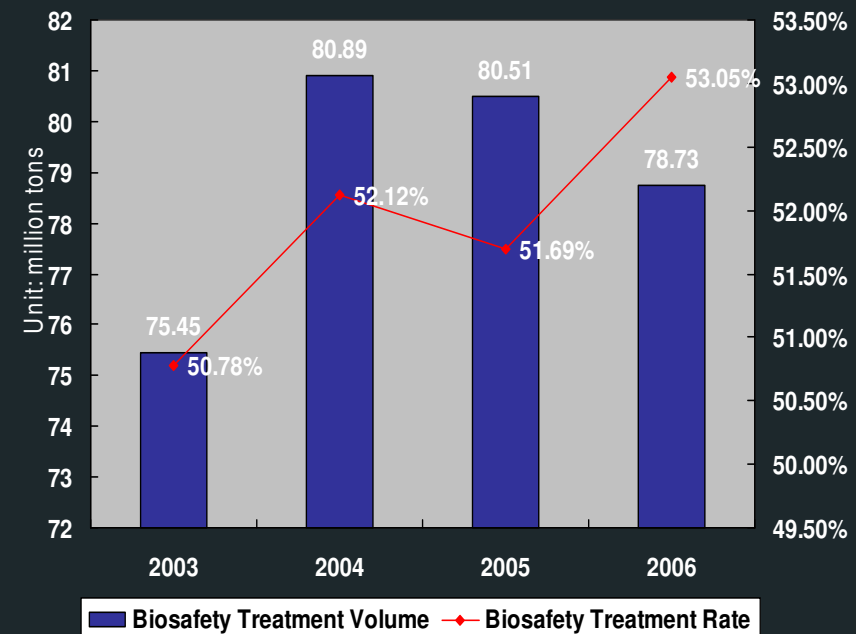
During the 11th Five-Year Plan period (2006-2010), China will continue to put more efforts to increase its investment in environmental protection and its total investment is expected to reach CNY1.375 trillion, up 64% compared to the 10th Five-Year Plan period (2001-2005). The investment in environmental protection will take up at least 1.5% of China's GDP in the same period.

According to the forecast and the analysis made by ERM, China will be one of the countries with the fastest growth in environment protection industry. The primary estimation of China's Ministry of Environmental Protection shows that China's environment protection industry is expected to have an average annual growth rate of 15% to 17% in the five years and its output value is forecast to total CNY880 billion to CNY1 trillion in 2010.

China's solid waste treatment industry originated in early 1980s. At present, its proportion amounts to less than 10% of the total output value of China's entire environmental protection industry. As China attaches more and more attention to the solid waste control, development potential in China solid waste treatment industry will be gradually released. In the period 2006-2010, China's solid waste treatment industry is forecast to have an average annual growth rate of more than 15%.

In 2006, China's urban refuse treated by biosafety disposal, mainly including landfill, composting and incineration, reached 78.73 million tons, less than that in 2005. China's biosafety treatment rate of living refuse stood at 53.05%, higher than that in 2005. The biosafety treatment rate of urban refuse in China is expected to exceed 60% in 2010, when the market size of China urban refuse treatment industry is forecast to reach around CNY200 billion.

**Urban Living Refuse Treatment Volume and Biosafety Treatment Rate in China, 2003-2006**



Source: ResearchInChina

In 2006, China's comprehensive utilization, storage and disposal of industrial solid waste were 926 million tons, 224 million tons and 429 million tons respectively. China's utilization rate of industrial solid waste reached 61%, indicating a continuous growth year by year. On the other hand, China's storage volume of industrial solid waste exceeds 200 million tons each year, implying that China is still under great pressure in storage of industrial solid waste.

Since 2004, China's production of equipment to dispose industrial solid waste has generally maintained a momentum of rapid growth. In the first two months of 2008, China's production of solid waste treatment equipment was 357 units, up 30.8% year on year. In 2007, China's production of solid waste treatment equipment reached 4,707 sets, up 83.4% year on year. The rapid growth in production shows that China's demand for solid waste treatment equipment is quite strong.

By the end of 2006, China has had 60 refuse-fired power plants and another 50 refuse-fired power plants either under construction or in the pipeline. According to the National Eleventh Five-Year Plan for Environmental Protection, refuse-fired power plant is one of the sectors with key support from the central government.

In 2006, China's Volume of urban refuse treatment through incineration took up only 15% of the total disposal volume and China's urban refuse treatment volume by refuse-fired power plants accounted for 8% of the total disposal volume, a low proportion, showing a bright future for the development of refuse-incinerated power generating industry.

The report is based on the authoritative statistics from the Ministry of Environmental Protection, the National Bureau of Statistics, the National Development and Reform Commission, the Ministry of Housing and Urban-Rural Development, the China Machinery Industry Federation and the China Association of Environmental Protection Industry, and some research findings publicized by some research institutes as well as some information from websites and financial reports of several key listed companies.

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